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ABSTRACT

Funded under the provisions of the Women's Educational Equity Act (WEEA) of 1974, project NEED (National Educational Equity Demonstration) evaluated two methodologies designed to assist in implementing educational change and demonstrating the innovations: the Wolf Welsh Linkage Methodology (WWLM), which provides a standardized synthesis of the research on educational change and can be operationalized: and the Wolf Knowledge Diffusion Utilization Inventory (WKDUI), which can be used for the systematic collection of needed data concerning the linkage process. Copies of the WWLM and WKDUI were distributed to the project staff to assess, implement, and document proposed equity change. It was concluded that the WWLM, easily understood by qualified professionals, would be very useful to federal agencies who write research funding proposals for educational demonstration. The WKDUI, while more difficult to use and requiring the assistance of the developer, could also be incorporated into the evaluation of such proposals and furnish agencies with an assessment of the contractor's readiness for change. Guidelines for the use of the two methodologies and copies of the inventory worksheets are attached. (RAA)

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A Field Test of Two Tools Designed to Link Knowledge with Needs of Knowledge Users

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A Field Test of Two Tools Designed to Link Knowledge with Needs of Knowledge Users

Introduction

The Women's Educational Equity Act (WEEA) enacted in 1974 was designed to promote educational equity. WEEA has awarded over 300 grants for the development of materials and products which enhance equal educational opportunities. Many of these products are available for use, and WEEA is focusing on the dissemination and evaluation of its products. In 1979 WEEA issued a request for proposal for national demonstration sites for educational equity. Specifications for the contractors included designing and implementing a plan to make a school district a model educationally equitable site. Five sites were chosen as model equity projects.

The five sites represent a broad range of school systems from across the country, from urban to rural, from a student population of barely 5,000 to one over 100,000. The demonstration sites and their contracting agencies are 1) Tuscon, Arizona Unified School District #1--American Institutes for Research; 2) Quincy, Massachusetts Public Schools--The Network; 3) Lincoln County, Oregon School System--Northwest Regional Educational Laboratory; 4) Broward County, Florida School District--The University of Miami; and 5) Reidsville, North Carolina School System--The University of Tennessee.

Problem Statement

This paper addresses the efforts of Project NEED (National Educational Equity Demonstration) in directing, demonstrating and documenting educational equity. Project NEED is a collaborative effort of The University of Tennessee and the Reidsville City School System. Both institutions reflect extensive experience in implementing and disseminating educational change.

The University of Tennessee (UT), a pioneer in the educational equity movement, had received three WEEA grants to develop equity products. Two of NEED's staff members had been involved in one of these projects and were experienced in developing and demonstrating equity materials. The University had received numerous grants to facilitate educational innovations. The Project Director had also managed other national dissemination projects and had studied the change process.

The Reidsville City School District had the reputation of being an innovative school district and had been awarded several projects to develop and test educational innovations. The district had a deep commitment to equal educational opportunities as typified by the preponderance of women in central office administrative roles.

The proposal called for the implementation and evaluation of WEEA products* with the ultimate goal of becoming a national demonstration site for educational equity. In order to achieve this goal two basic assumptions had to be met: 1) presumably the evaluation of WEEA products would show that they promote educational equity, and 2) incorporation of the materials would make the district a model educationally equitable site.** However, time provisions were not made for testing materials, implementation, and demonstration. One year was allowed for the designing of an implementation plan with the demonstration commencing the following year.

The project's task was two-fold: 1) implementing educational change, and 2) demonstrating the innovations. In light of the mandate and the

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*Non-WEEA products could be used if appropriate WEEA products were not available.

**The staff of Project NEED felt that the infusion of equity materials per se would not achieve equity. Teachers electing to use equity materials have received training on equity issues and the effects of nonverbal communications on classroom practices. Evaluation of the project allows for the degree of exposure to equity training.

circumstances, the Director was determined to utilize the research that had been conducted on change and innovations. The first hurdle that had to be crossed was whose theory to choose--Havelock, Rogers, Guba and Clark? All theories had components that were applicable. What was needed was a synthesis of the research on educational change that was both standardized and could be operationalized. Such a tool would assist in implementing the innovation and in documenting the change process.

The Project Director became acquainted with Wolf's research on knowledge diffusion utilization. He had wrestled with the same problem years earlier and had developed the Wolf-Welsh Linkage Methodology (WWLM). The WWLM is a theoretical configuration on knowledge diffusion utilization which represents an accumulation of empirical research on the topic. He had also developed the Wolf Knowledge Diffusion Utilization Inventory (WKDUI). The WKDUI can be used to systematically collect needed data concerning the linkage process. The two tools had undergone limited field testing. Project NEED staff agreed to use the instrument to assess, implement, and document the proposed equity change.

Procedure

Copies of the WWLM and WKDUI were distributed to the project's staff (see Appendix). Wolf then gave a verbal explanation of his methodology and highlighted practical uses of the two tools. He then assisted the staff in completing the WKDUI.

Results

The WWLM is an excellent synthesis of empirical educational change. It is easily understood and appreciated by educators knowledgeable of change theory. However, WWLM is very confusing to persons unfamiliar with change and dissemination research. Staff not exposed to these theories did

not fully understand the implications of the document until Wolf provided explanations and illustrations. Once the staff understood the contents they endorsed the idea of using a systematic change plan that could be replicated.

The project's staff could not use the WKDUI* without additional instruction. Since the NEED project involved both internal and external change agents there was confusion as to how to answer the questions. Many of the answers were "guestimations." Scale VI, Ascertaining the Viability of Selected Communication Tactics, was most confusing and required direct assistance from the inventor. Results were plotted on Form I: Relationship Between Communication Intentions and Complexity of Task. The graphic display still left the staff wondering what the scores meant. The only thing that the project's staff knew was that the highest scores were in the following categories: 1) Conditions for Change within the Targeted Environment, and 2) Characteristics and Commitments of Person Responsible for Linkage. The lowest score pertained to Characteristics of the Environment Targeted for Change. The scores suggested that necessary conditions existed for accomplishing our change aspirations.

Applications

The WWLM was useful to the Project Director for it synthesized and operationalized a plethora of research on dissemination and knowledge utilization. It provided a framework for the change strategy and served as a reference for the project's staff as they implemented their plans. As with any tool, the components of the methodology which had direct application were adapted accordingly. The steps in the WWLM which were most beneficial were 1) Step II--Identification of a Targeted Audience's Need to Modify Some

*The fifth version of the WKDUI is self-explanatory. Thus, the present application helped to refine the instrument and the methodology.

Aspect or Aspects of Professional Practices; 2) Step V--Modification of Practices and/or Products Selected to Meet Identified Needs of Targeted Audience; 3) Step VI--Determination of Demographic Characteristics and Certain Attitudes of the Targeted Audience; and 4) Step VII--Conceptualization and Implementation of Strategies and Tactics Intended to Incorporate Designated Practices and/or Products within the Professional Practice of the Targeted Audience.

Step II made the NEED staff realize that the districtwide changes would not occur immediately and that specified members of a targeted population had to be identified and their roles clarified. Although the RFP stated that the innovations were to be implemented districtwide, the WWLM confirmed the project staff's belief that the change must be targeted.

Step V alerted the NEED staff to the fact that in many cases the WEEA products were not compatible with current practices and that adjustments needed to be made prior to implementation. Suggestions contained in Step VI were incorporated in gaining school and community support. Local school and community advisory boards are composed of "influentials" from each audience. The project's staff also decided not to "spin their wheels" on isolates or entrenchers.

Perhaps Step VII, conceptualizing strategies, was the most crucial step in the implementation. In addition to having advisory boards composed of "influentials," a core of teachers volunteered to use and demonstrate the materials. These teachers will be the change agents within their respective schools and will be responsible for expanding equity efforts. Project staff have worked directly with the teachers in adapting the innovations, and the teachers are doing the same with their colleagues. The core teachers and advisory boards are involved in strategies to implement and demonstrate equity.

As mentioned previously, the purpose of the WKDUI was not readily understood by NEED's staff. However, it did provide the Project Director with additional information about characteristics of the demonstration site. The results from the survey did indicate favorable and unfavorable conditions for change. An item analysis of the WKDUI suggested that conditions existed which were conducive to change: 1) resource potential, 2) availability of needs assessment, 3) compatibility of linker and target audience, 4) prior history of successful linkages, and 5) amount of time committed by the linker. Analysis of the instrument also revealed areas which could hinder the change process: 1) availability of information which indicates the proposed innovation improves on existing practices, 2) compatibility of the proposed innovation with existing practice, 3) the extent to which the innovation could be observed, 4) dissatisfaction with current practices, and 5) number of persons and administrative units targeted for change.

The scores suggested strengths in regards to characteristics of the linker and conditions for change within the targeted environment. Weaker areas included characteristics of the innovation and characteristics of the environment targeted for change. The project staff attempted to strengthen these weaknesses by introducting the change in a piecemeal fashion and by documenting its successes.*

The lowest score that NEED received on the WKDUI was a six. This suggests that the linkage aspiration was at the pilot test level. On the

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*A large percent of the proposed educational change deals with affective rather than cognitive changes, thus complicating the implementation, documentation and demonstration. The NEED staff have designed an evaluation plan to assist in alleviating problems associated with affective change.

instrument all of the choices are assigned the same weight. This assumes that each item has equal importance in the communication enterprise. Careful examination of the instrument might suggest that some items are more critical to linkage than others and that the items should be weighted. This would provide the linker with more realistic aspiration levels.

The format of the WWLM was used in designing the change process. Of course, certain components of the methodology were emphasized more than others. The WWLM format will also be followed in the documentation of the change process. The best test of these two instruments will probably occur when another school district attempts to follow NEED's change documentation.

Finally, the WWLM could be very useful to federal agencies who write RFP's for educational demonstrations. The synthesis of knowledge utilization and dissemination could assist project officers in ensuring successful demonstrations. The WKDUI could also be incorporated into the evaluation component of such proposals. The results from this instrument could provide agencies with an assessment of the contractor's readiness for change.

WOLF-WELSH LINKAGE METHODOLOGY

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Appendix

I. ATTRIBUTES OF PERSON APT TO USE THE LINKAGE METHODOLOGY EFFECTIVELY

A. Prior experience of person.

1. Person has successfully linked some aspect of knowledge production with some aspect of knowledge utilization within an institutional setting at least once, preferably twice.

2. Person's professional background and demographic characteristics and the professional background and demographic characteristics of the typical member of a targeted audience are reasonably compatible.

B. Person is able to devote considerable time (hopefully, at least one day per week) to the linkage task.

C. Person can be counted upon to deliver promised services on time.

D. Person either has been trained to do some aspects of the following work or is accustomed to contracting with specialists for work desired.

1. Assess needs of targeted audiences.

2. Survey literature for various reasons, be able to retrieve pertinent material, and be able to meaningfully summarize results.

3. Ascertain demographic characteristics and attitudes of targeted audiences.

4. Conceptualize and then expedite diffusion/utilization strategies and tactics.

5. Conceptualize and then expedite evaluation strategies and tactics.

6. Prepare coherent project reports.

E. Person understands basic elements of individual and group motivation and is able to apply such know-how routinely.

F. Person listens well and communicates effectively.

II. IDENTIFICATION OF A TARGETED AUDIENCE'S NEED TO MODIFY SOME ASPECT OR ASPECTS OF PROFESSIONAL PRACTICE

A. Define parameters of a targeted audience.

1. Specify members of a targeted audience (i.e., all persons in two elementary schools, or, special education personnel in a large city).

2. Clarify roles of persons within the targeted audience (i.e., students, teachers, supervisors, administrators, etc.)

B. Ascertain needs of the targeted audience to modify practice, using modus operandi like the following:

1. Examine relevant materials (for example, local, state, and federal education agency documents) for agency policy shifts, expansion, or contraction.

2. Conduct surveys of various members of the targeted audience (use a packaged needs analysis methodology if applicable and if time permits).

3. Compare practices of targeted audience with practices of other similar groups.

4. Examine available test results.

5. Examine available demographic data (i.e., population trends) which pertain to the targeted audience.

C. List and prioritize needs of targeted audience.

1. Prepare a list of the identified needs.

2. Distribute the list to various members of the targeted audience for the purpose of determining their priorities (repeat as necessary until a clear picture of priorities unfolds).

3. Use members' responses as a point of departure for establishing a prioritized list of needs.

D. Clarify who will participate in the final selection of the specific need or needs to be addressed (i.e., a committee, all involved persons, etc.).

E. Use the following criteria to facilitate selection of the specific need or needs to be addressed.

1. Resources required to meet the need or needs.
2. Time required to meet the need or needs.
3. Positive and negative consequences of meeting the need or needs.
4. Extent of target audience support/agreement.

NOTE: If the needs of a well-defined targeted audience have been ascertained, simply review what has been accomplished in light of the elements of Step II. Carry out only that work which has been overlooked during or deleted from the initial effort.

III. IDENTIFICATION OF PRACTICES AND/OR PRODUCTS APT TO MEET IDENTIFIED TARGET AUDIENCE'S NEEDS

A. Determine existence of practices and/or products apt to meet need or needs.

1. Search existing information repositories for desired know-how (i.e., ERIC, EPIE Institute, CEDaR Catalog, the PREP reports, etc.).
2. Search catalogues of publishers and other vendors for desired know-how.

3. Survey other groups like the targeted audience to find out what relevant practices and/or products are being used.
4. Survey selected members of the targeted audience for desired know-how.
5. Survey specialists for desired know-how.

B. Prepare a list of the available practices and/or products apt to meet the need or needs.

NOTE: If a specific practice and/or product is known which probably will meet the need or needs identified, and if further searching and surveying does not seem appropriate or necessary, work called for in Step III may be reduced or eliminated entirely.

IV. SELECTION OF PRACTICES AND/OR PRODUCTS APT TO MEET IDENTIFIED TARGET AUDIENCE'S NEEDS

A. Distribute the prepared list of practices and/or products to various members of the targeted audience for the purpose of determining their priorities (repeat as necessary until a clear picture of priorities unfolds).

B. Prioritize the list on the basis of responses received.

C. Clarify who will participate in the final selection of the practices and/or products.

D. Establish criteria like the following, set forth conditions for acceptance/rejection, and then use the criteria to facilitate selection of the specific practices and/or products.

1. Resources required to effectively utilize the practices and/or products.
2. Time required to effectively implement the practices and/or products.

3. Positive and negative consequences of implementing the practices and/or products.

NOTE: If a specific practice and/or product is known which probably will meet the need or needs identified, work called for in Step IV may be reduced or eliminated entirely.

V. MODIFICATION OF PRACTICES AND/OR PRODUCTS SELECTED TO MEET IDENTIFIED NEEDS OF TARGETED AUDIENCE

A. Ascertain (using some sort of survey procedure) the extent to which selected practices and/or products are compatible with generally accepted professional practices of the target audience members.

1. Compatibility (i.e., up-dating science instructional resources) is a positive indicator.
2. Incompatibility (i.e., offering--for the first time--junior high school students an elective sex education class) indicates further action must be contemplated.
   a. Review specifics of the selected practices and/or products for the purpose of isolating troublesome elements.
   b. Delete troublesome elements if possible.
   c. If troublesome elements cannot be deleted, reduce them to their least controversial form.
   d. Make plans to cope with all aspects of adversity-related to the controversial elements-which can be anticipated.

B. Divide the selected practices and/or products into their most basic elements.

1. Make plans to introduce the selections either piecemeal or in toto.
2. Make plans to introduce the selections as a pilot undertaking or in toto.
3. Prepare cost estimates for implementing the various options suggested in Steps VB1 and VB2 above.

C. Expedite whatever additional adaptations of the selections seem appropriate to enhance the probability of modifying the specified professional practices.

VI. DETERMINATION OF DEMOGRAPHIC CHARACTERISTICS AND CERTAIN ATTITUDES (TOWARD THE PLAN TO MODIFY SOME ASPECT OR ASPECTS OF PROFESSIONAL PRACTICE) OF THE TARGETED AUDIENCE

A. Survey members of the targeted audience to ascertain their prior history of professional self-renewal.
   1. Identify those persons (self-renewers) who routinely modify their professional practice.
   2. Identify those persons (entrenchers) who seldom modify their professional practice.

B. Use an uncomplicated sociometric survey technique (many options are available) to ascertain who are the "influentials" and who are the "isolates" within the targeted audience.
   1. Identify the influentials.
   2. Identify the isolates.

C. Interview a sample of the identified self-renewers and the influentials to determine their respective attitudes toward the practices and/or products selected to meet specified needs of the targeted audience.

2. The strategy involves two steps: Step one focuses upon self-renewers and influentials; step two utilizes these persons to influence others in the targeted audience.
3. The strategy makes maximum use of interpersonal (preferably face-to-face and two-way) channels of communication.
4. The strategy is participative in that all persons who are to be affected by the modifications in practice participate in making decisions about the undertaking.
5. The strategy incorporates a time line which projects the realization of specified aspirations.

B. Offer the conceptualized strategy (with appropriate tactics) to selected persons identified as self-renewers and influentials for their critical review, and then modify it on the basis of feedback provided.

C. Implement the strategy (with appropriate tactics).

1. Expedite step one of the two-step plan.
   a. Utilize varied interpersonal channels of communication to introduce the selected practices and/or products to the previously identified self-renewers and influentials.
   b. Work closely with the self-renewers and influentials until a core of them have modified their professional practice as desired.
   c. Recruit from the core of successful persons a small number willing to become involved in generalizing the modifications in practice to other persons within the targeted audience.

1. Affirmation is a positive indicator.
2. Either mixed reactions or opposition indicates further action must be contemplated.
   a. Review specifics of the interviews completed to isolate the sources of controversy.
   b. Eliminate controversial aspects of the implementation undertaking if possible.
   c. If controversial aspects cannot be eliminated, confront the sources of controversy and either overcome them or neutralize them.
   d. Discontinue the attempt to modify professional practice, using the selected practices and/or products, if the controversy persists in force.
   e. If the problem continues to fester, go back to Step II and try again.

D. There is no need to invest either time or resources interacting with persons identified as entrenchers or isolates at this point in the implementation process.

VII. CONCEPTUALIZATION AND IMPLEMENTATION OF STRATEGIES AND TACTICS INTENDED TO INCORPORATE DESIGNATED PRACTICES AND/OR PRODUCTS WITHIN THE PROFESSIONAL PRACTICE OF THE TARGETED AUDIENCE

A. Conceptualize a strategy (with appropriate tactics) which meets five conditions.
   1. The strategy is geared primarily to the enterprise of persons identified as self-renewers and influentials, but it also involves all persons who will be influenced by modifications in practice.

2. Expedite step two of the two-step plan.

   a. Utilize varied interpersonal channels of communication to share desired modifications in the practice of the recruited self-renewers and influentials with other members of the targeted audience.

   b. Work closely with the recruited self-renewers and influentials during their attempts to convince selected peers to modify practice as desired.

   c. Continue the process of interaction until a substantial core of the targeted audience has modified professional practice as desired.

VIII. PART ONE. EVALUATION OF THE IMPACT OF THE DESIGNATED PRACTICES AND/OR PRODUCTS UPON THE PROFESSIONAL PRACTICE OF THE TARGETED AUDIENCE (EVALUATION OF THE MODIFICATION IN PRACTICE)

VIII. PART TWO. EVALUATION OF THE EFFICACY OF STEPS I THROUGH VII TO MEET NEEDS THROUGH THE MODIFICATION OF SOME ASPECTS OF THE PROFESSIONAL PRACTICE OF A TARGETED AUDIENCE (EVALUATION OF THE METHODOLOGY)

A. Conceptualize evaluation plans which meet six conditions.

   1. The plans make provision for formative data acquisition at regular intervals throughout the implementation undertaking.
   2. The plans make provision for summative data acquisition.
   3. The plans can be expedited within the framework of available resources.
   4. The plans make provision for the preparation of reports which can be understood by persons responsible for decision-making, and by persons being affected by the modification in practice.
   5. The plans are set forth so clearly that a valid independent replication of them would be conceivable.
   6. The plans take into account standard reliability and validity concerns associated with gathering, analyzing, and reporting consequences of data.

B. Offer the conceptualized evaluation plans to at least one evaluation specialist for his or her critical review, and then modify the plans on the basis of feedback provided.

C. Highlight four consequences of the selected practices and/or products upon the professional practice of the targeted audience when expediting the revised plans.

1. The number of persons who could have and the number of persons who actually did modify their professional practice as desired.
   a. Characteristics of the set of persons who opted to modify their practice as desired.
   b. Characteristics of the set of persons who opted not to modify their practice.
   c. Similarities and differences between the two sets of persons.
2. Perspectives, derived from the "adopting" set of persons, pertaining to whether or not their needs were met.
3. Perspectives, derived from the "adopting" set of persons, pertaining to positive and negative effects of the implementations upon their professional practice.
4. Relationships between resource consumption and time allocation on the one hand and the utilization of desired practices and/or products on the other.

D. Highlight the extent to which Steps I through VII of the linkage methodology met needs of a targeted audience when expediting the revised plans.

1. Perspectives, derived from the person or persons who used the tool, pertaining to the viability of Steps I through VII.
   a. Additional steps or sub-steps needed.
   b. Steps or sub-steps not needed.

2. Perspectives, derived from the person or persons who used the tool, pertaining to the precision of language contained in Steps I through VII.

3. Perspectives, derived from the person or persons who used the tool, pertaining to the precision of suggested activities contained in Steps I through VII.

IX. RECOMMENDATIONS FOR IMPROVING UPON THE LINKAGE METHODOLOGY (STEPS I THROUGH VIII) ON THE BASIS OF EVALUATION RESULTS (OFFERED BY PERSONS WHO USED THE METHODOLOGY)

A. Set forth recommendations for increasing the precision of language contained in Step I through Step VIII of the tool.

B. Set forth recommendations for increasing the precision of suggested actions contained in Step I through Step VIII of the tool.

C. Set forth recommendations for adding steps or sub-steps to fill gaps recognized between Step I and Step VIII of the tool.

D. Set forth recommendations for deleting steps or sub-steps deemed unnecessary between Step I and Step VIII of the tool.

VI THE WOLF KNOWLEDGE DIFFUSION/UTILIZATION INVENTORY

The Wolf Knowledge Diffusion/Utilization Inventory is a product of the configuration of diffusion/utilization factors presented as Figure I (see P. 3). It was designed to provide linkage agents with decision-oriented data of importance to communication enterprise.

The inventory consists of six separate sections. Part One is designed to clarify the linkage agent's communication aspiration. That is, four different levels of communication activity are related to a scale of communication complexity. Minimum scores, needed to effectively embark upon desired communication enterprise, have been established to guide linker's work. By comparing scores obtained on each of the subsequent parts of the inventory with the established minimum levels, the linker can grasp (a) specific strengths and deficiencies of the communication enterprise, and (b) a perspective of likely consequences of the communication enterprise.

Parts Two through Six are designed to be implemented sequentially. Part Two and Part Three, for example, are to be implemented first; Part Four and Part Five second; and, Part Six last. Such a sequence can be varied by linkers to meet their respective needs. Data accumulated in this manner can then be related to Part One to ascertain the viability of the linkage agent's aspirations. There are other specific applications of these data as well.

Part Two focuses upon four "conditions" for change within targeted environments. Part Three highlights characteristics of the

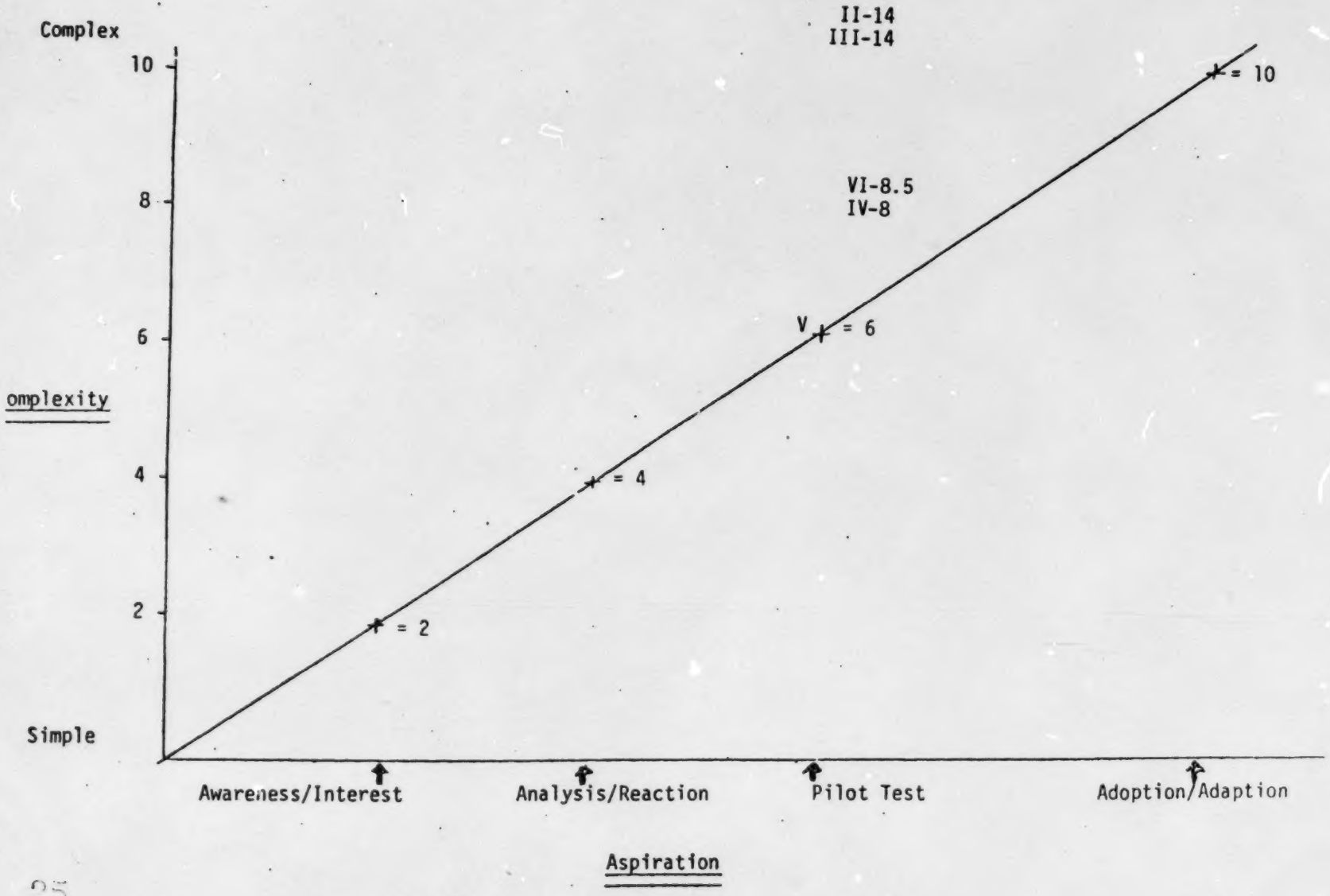
person(s) responsible for the linkage. Part Four emphasizes characteristics of the innovation(s) to be institutionalized. Part Five places emphasis upon characteristics of environments targeted for change. And Part Six focuses upon the viability of selected communication tactics.

Data sought are relatively straight-forward and obvious, with one exception. Since the person or persons responsible for the linkage enterprise must pass judgement on his or her (their) own characteristics when attending to Part Three, some loss of precision is a probable residual of the self-appraisal.

The Wolf Knowledge Diffusion/Utilization Inventory is offered for examination and utilization by persons who assume varied communication responsibilities. It is not unreasonable to believe the Inventory will serve these persons by increasing their effectiveness.

Linkage agents, armed with an extensive array of decision-oriented data provided by the inventory, can reduce the guesswork associated with communication enterprise, they can expeditiously attack specific problems which arise, and, they can dramatically alter communication plans prior to the commitment of extensive resources. Persons using the inventory have the added advantage of objective documentation to support some or many of their communication decisions.

I. RELATIONSHIP BETWEEN COMMUNICATION INTENTIONS AND COMPLEXITY OF TASK



NOTE: Arrow indicates minimum score needed to effectively embark upon desired communication enterprise.

II. ASCERTAINING CONDITIONS FOR CHANGE WITHIN TARGETED ENVIRONMENTS

Conditions For Change	Weight		
1. Number of innovations successfully institutionalized within past three years.	a. None	-0-	4
	b. One or two	-2-	
	c. More than two	-4-	
2. Extent of dissatisfaction with current practice earmarked for change	a. Less than 10% of persons affected are dissatisfied	-0-	2
	b. Ten to fifty percent	-2-	
	c. More than 50% of persons affected are dissatisfied	-4-	
3. Availability of current "needs assessment" information pertaining to change contemplated	a. None available	-0-	4
	b. Some available	-2-	
	c. Much available	-4-	
4. Resource potential (i.e., risk money, facilities, flexible staff, etc.) of environment to be changed.	a. None or limited	-0-	4
	b. Moderate	-2-	
	c. Extensive	-4-	
		Score	14

III. ASCERTAINING CHARACTERISTICS AND COMMITMENTS OF THE PERSON(S) RESPONSIBLE FOR LINKAGE

	Characteristics of Person(s)	Weight		
1.	Prior history of successfully linking some aspect of knowledge production with some aspect of knowledge utilization in an institutional setting.	a. None b. Once or twice c. More than twice	-0- -2- -4-	2
2.	Compatibility between characteristics and background of the linker(s) (i.e., training, experience, demographic characteristics, etc.) and the characteristics and background of a targeted audience.	a. Little or no compatibility b. Some compatibility c. Much compatibility	-0- -2- -4-	4
3.	Amount of time committed by linker(s) to expedite the change undertaking.	a. Little (less than several weeks total commitment) b. Moderate (more than several weeks total commitment, but less than one day per week) c. Extensive (at least one day per week)	-0- -2- -4-	4
4.	Linker's level of responsibility throughout change undertaking.	a. Data acquisition b. Data acquisition and advisory c. Data acquisition, advisory, and leadership as needed	-0- -2- -4-	4
			Score	14

IV. ASCERTAINING CHARACTERISTICS OF INNOVATION(S) TO BE INSTITUTIONALIZED

Characteristics of Innovation(s)	Weight		
1. Availability of information indicating the proposed innovation improves upon existing practice	a. None b. Some available c. Much available	-0- -2- -4-	2
2. Problems apt to be associated with institutionalization of the proposed innovation.	a. Many b. Some c. None anticipated	-0- -2- -4-	0
3. Compatibility of the proposed innovation with existing practice.	a. Marked departure b. Somewhat compatible c. Most compatible	-0- -2- -4-	2
4. Extent to which the proposed innovation can be observed being utilized	a. Not visible b. Occasionally visible c. Routinely visible	-0- -2- -4-	4
		Score	~~14~~ 8

V. ASCERTAINING CHARACTERISTICS OF ENVIRONMENTS TARGETED FOR CHANGE

Environmental Considerations	Weight	
1. Number of persons in targeted environment to be affected by change.	a. Many (more than 200) -0- b. Moderate (50 to 199) -2- c. Few (less than 50) -4-	0
2. Number of new staff added within past three years.	a. Less than 5% of total -0- b. Five to ten percent -2- c. More than 10% of total -4-	2
3. Number of decision-making levels in targeted environment.	a. More than three -0- b. Three -2- c. One or two -4-	4
4. Number of administrative units (i.e., schools) to be affected by change.	a. More than three -0- b. Two or three -2- c. One -4-	0
	Score	6

VI. ASCERTAINING THE VIABILITY OF SELECTED COMMUNICATION TACTICS

Planning Considerations / Communication Tactics	Personnel Committed To Communication Enterprise			Estimated Percentage of Target Audience Reached			Estimated Time Involvement For Communication			Probability of Follow-up After Initial Communication			Score
	None -0-	One -2-	Two or more -4-	Low (less than 15%) -0-	Moderate (16% to 84%) -2-	High (85% or more) -4-	Little (less than one day) -0-	Moderate (one day to two weeks) -2-	Extensive (more than two weeks) -4-	None -0-	Once -2-	At least two or more times -4-	
A. One-Way Communication Primarily													
1. Printed Matter			4		2			4			2		12
2. Other media forms			4		2		2				2		10
3. Demonstration			4		2			4			2		12
B. Two-Way Communication Primarily													
4. Workshops and institutes			4		2			4			2		12
5. Demonstration			4		2			4				4	14
6. Periodic meetings													
7. Consultant format			4		2		2	1			2		11
8. Formal training													
9. Designated jobs/position			4										4
10. Informal contact			4		2		2				2		10

NOTE: Add points obtained when two or more strategies are contemplated.